



Jeff Makoff – Valle Makoff LLP

WELCOME TO THE POST-MARRIAGE WORLD: HOW TO ADVISE A GENERATION THAT SAYS "I DON'T"

We are approaching an era – possibly permanent – in which most people will not get married, ever. The “married by 32” rate for millennials is 26% (down from 36% for GenX, 50% for Baby Boomers and 65% for the Silent Generation). Nearly half of Americans agree that “marriage is becoming obsolete.” Yet couples continue to move-in together, make increasingly complex financial deals and decisions, purchase and improve property, form and grow businesses and have children. What has changed for individuals and their advisors are the life events that signal a need for planning – traditionally engagement, marriage, in-law joining the business, marital separation, divorce, and death of a spouse. There are important new action points, different sets of laws, and powerful legal and financial approaches to establish or clarify a couple’s rights, obligations and intentions. In this presentation, a San Francisco attorney who advises prominent entrepreneur couples (married and unmarried) on their legal and financial relationships will survey the timing, terminology and laws that govern couple-centric financial and business succession planning in the post-marriage era.

Jeff Makoff is a Partner in Valle Makoff LLP, a 20-lawyer San Francisco and Los Angeles firm that represents prominent individuals and private and public companies throughout California. Jeff’s practice primarily involves disputes about family business ownership, management and control. He is an expert in fiduciary duties and the Executive Editor of a 2019 treatise on California business governance. He is the author of a CEB guide on “Fiduciary Duties in Family Businesses and Transactions.” He speaks at programs for CEB, the American Academy of Matrimonial Lawyers and the Forensic Expert Witness Association. He was a founding Co-Chair of the California State Bar Business Litigation Committee. Jeff started his career at Skadden, Arps, Slate, Meagher & Flom under nationally-renowned trial lawyers Frank Rothman, Bill Masterson, and Michael Diamond. He received his J.D. in 1985 from the University of California, Hastings College of the Law in San Francisco. He received a Bachelor of Arts Degree in 1981, cum laude, from UCLA.

Join us on **Wednesday, September 26, 2018** at 5:30 PM
At the Omni Hotel - 500 California (at Montgomery) in San Francisco.

\$75 Preregistered Members \$95 Preregistered Guests
At the door – Registrations still needed - \$80 members and \$100 guests
Reservation needed by September 24, 2018

Send a check with names to: SFEPC – 767 Brannan Place – Concord, CA 94518
Or pay by credit card – <http://www.123signup.com/calendar?org=sfepc>

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MCLE: This activity is approved for MCLE credit of one hour by the State Bar of California.

CPA & CFP®: A sign-in sheet and an attendance certificate are provided at each meeting.

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